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MUSIC USA 1981

American Music Conference

1981 Review of the Music Industry and Amateur Music Participation

FROM THE CHAIRMAN

The new decade presented many of the challenges the industry had anticipated. In many instances, these proved to be a balance of problem and promise.

On the one hand inflation continued to affect both school and personal incomes. On the other hand, the lower relative cost of American instruments became a major selling asset in world markets. Some potential instrument buyers put off major purchases but amateurs generally signaled their commitment to music with continued strong purchases of sheet music and accessories.

According to a 1980 Harris poll, "the twin pressures of inflation and joblessness have forced some rather drastic changes in lifestyles and time commitments...For the arts...this in turn means...greater competition to attract people with more limited time and money to spend." However, the research results which showed dramatic increases in music participation among American adults, led Mr. Harris to observe that "the arts are the only areas tested where people report an increase rather than a decrease in involvement. This can only mean that the arts are becoming a more vital and integral part of the mainstream of life of the American people."

As this is being written, it seems clear that while the music market is far from immune to economic trends, it has the flexibility, resourcefulness and appeal to find new markets and approach old markets with new ideas.

For over 35 years, the American Music Conference has maintained a strong presence within the music industry. It is playing a role of growing importance in the educator community and has a well-focused promotional effort that keeps the music message before the general public.

AMC's efficient staff, ably headed by Gene Wenner, cemented vital new relationships between industry and educator groups during the past year and continued to research more effective ways to work together.

New developments within industry organizations will allow AMC to move ahead even more forcefully to stimulate music participation and a deeper appreciation of music's role in education and in a more fulfilling life.

Robert G. Campbell
Chairman

■ *This ad for the Eastman Kodak Co., created by J. Walter Thompson, New York City, took top honors in AMC's 28th annual Advertising Awards competition, color print division. Print ads and television commercials are judged on creativity, effectiveness of presentation and integration of a musical theme into the message for a nonmusical product.*

During 1980-81, AMC continued to encourage participation in musical activities through a wide variety of programs ranging from problem-solving seminars to an extensive public service announcement campaign on radio and television. AMC's award-winning publicity program annually reaches many millions of Americans and the association's growing grassroots work with educators and industry members throughout the country is no less important to building a strong base for musical activities in America.

Identifying issues and answers

Improving private music instruction: AMC convened the first conference on private music instruction which brought together 48 music publishers, retailers, manufacturers and educators for two days of discussion. The seminar focused on strengths and weaknesses of current instructional practices, a review of ways in which private music teaching can be improved and better promoted, and recommendations for industry and educator action in the future.

Testing the economic weather: The fourth annual Economic Council of the Music Industry was held this year in Chicago. Keynote speakers Morley P. Thompson, president of Baldwin-United, and Kenneth L. Ingram, president of K.G. Gemeinhardt, stressed the realities of the selling climate in the 1980's, and explored ways in which marketing approaches can be improved. The 30 manufacturer, publisher and retailer participants developed the conference themes in depth during the two days of smaller group meetings.

Getting more help from Washington: Interested AMC board members had an all-day session with representatives of the U.S. Department of Commerce involved with compiling import and export statistics and assisting manufacturers in trading abroad.

A voice at major conferences: AMC's president made dozens of speeches during the year to educator and industry groups about current challenges and opportunities in the music field. Among the major groups Gene Wenner addressed were the Chamber Music Society at their annual meeting in Santa Fe, New Mexico, and the Kansas Music Merchants, in Wichita, Kansas.

Messages with impact: The AMC public relations program was awarded a "Gold Circle" by the American Society of Association Executives for its on-going effort "to create in the American public the motivation to play a musical instrument." One of the judges commented: "Good results—the bottom line." The award is presented each year to associations for excellence in communications.

The award citation noted AMC's success in reaching Americans through public service announcements on radio and television, features in the national and local press, its own awards programs, and other activities. This is AMC's first "Gold Circle," but its sixth award in the past eight years for outstanding public relations programming.

Celebrities echo the message

Millions of radio listeners around the country are hearing encouraging words about making music from Stevie Nicks, Dick Van Dyke, Chick Corea, Chet Atkins, Les Paul and Minnie Pearl as part of AMC's continuing program to move Americans toward their pianos, drums, violins, horns and a lifetime of musical enjoyment.

Public service directors of radio stations commented on the series: "Heads America in a constructive direction" to "I'm a musician and this is a great campaign."

A new series of radio spots, to include messages from Shirley Jones, Ben Vereen and George Gobel will be aired later in 1981. In addition, a video spot featuring political satirist Mark Russell is being made available to television stations throughout the country.

Grants from NEA, Atlantic Richfield

A $15,000 grant from the National Endowment for the Arts and a $5,000 grant from the Atlantic Richfield Company to AMC assured the continued broadcasting of performances by a variety of American orchestras. The Parkway Broadcasting Company is recording concerts by symphony orchestras and chamber ensembles in both large and small cities for broadcast on radio stations throughout America. Funds received from Atlantic Richfield will make possible the maintenance of these broadcast recordings in the Library of Congress archives

The National Endowment for the Arts Artists-in-Schools Program provided $50,000 for AMC to assist in the coordination and development of a workshop for state and local jazz music educators, administrators and jazz artists. All are participants in a pilot program called "Jazz Artists in Schools." A portion of the grant was also used for printing of the workshop materials.

On the management side

AMC administers the Leslie B. Propp Music Scholarship which was awarded for the first time this year. Grants were given to two graduate students to carry out research into development of music materials for children in day care centers and an analysis of background and characteristics of professional musicians from the time of their first expressions of interest in music.

AMC has inaugurated an intern program with Indiana State University. Students selected spend six months in the AMC office working on research and other special assignments.

Pre-school education program ready

A series of eight films that will provide lively classroom instruction in "Music Images" has been completed and will be available to educators for pre-school teaching programs. During the coming year, AMC will be involved in other supportive programs to stimulate pre-school music involvement.

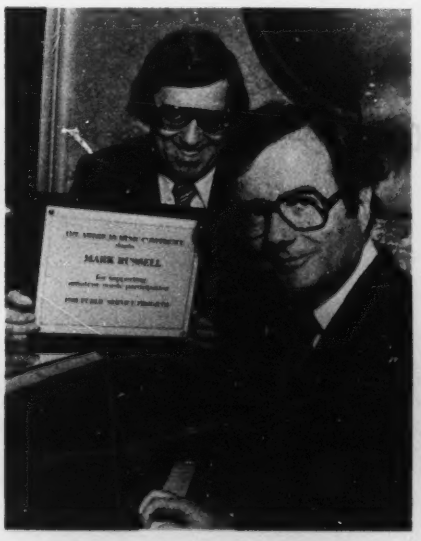
Recognition makes news

AMC awards to individuals and companies for outstanding achievement also act as stimulants to carry the music message and help increase its impact. These awards include:

- The first "Music Educator of the Year" award, presented to Dr. Lee Kjelson, director of choral music and chairman of music education at the University of Miami School of Music in Coral Gables, Florida. This AMC award was instituted to honor distinguished teaching of instrumental or choral music in either public or private instruction from kindergarten through college.
- The 28th annual Advertising Awards, in recognition of the best use of musical instruments in advertising for nonmusical products. First place honors were won by Eastman Kodak Co. for a print color ad; N.W. Ayer ABH International, for black and white, and Pepsi Cola for a television commercial.
- Family of the Year honors musical families to represent the country's 50 million amateur musicians. AMC's 1981 "Family of the Year" was the Floyd Roehl family of New Leipzig, North Dakota.

  In addition, six regional winners were named and one special award presented to recognize the most "extended" musical family.
- The Songwriting Contest co-sponsored with Scholastic Magazines, Inc., open to all junior and senior high school students. The winner of this year's first prize is Kari Swift, 16, a junior at Hempfield High School, Landisville, Pennsylvania.
- A National Newspaper Association competition to select the best coverage of community music activities. This year's award went to the San Rafael (California) Independent-Journal for its thorough and imaginative reporting of Marin County music activities.

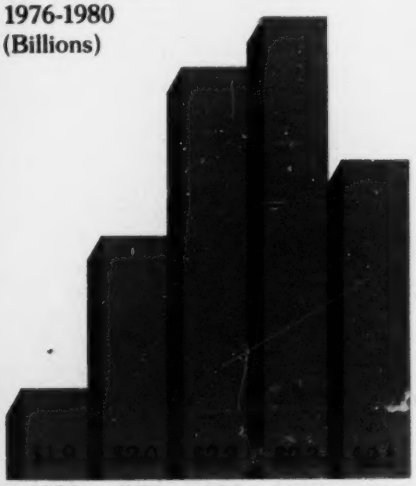
■ *Dr. Lee Kjelson (left), "Music Educator of the Year," receives a plaque from AMC President Gene C. Wenner at the Florida Music Educators Conference in Daytona Beach, Florida. Dr. Kjelson, director of choral music and chairman of music education at the University of Miami School of Music, is the first recipient of the award which honors distinguished teaching of instrumental or choral music in either public or private instruction from kindergarten through college.*



■ *AMC President Gene Wenner presents Mark Russell, political satirist, with a plaque in appreciation of Russell's support for amateur music participation. A television public service announcement in which Russell speaks out for music involvement, was co-sponsored by AMC and the National Piano Manufacturers Association and will be released later this year.*

RETAIL SALES OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND INSTRUMENT ACCESSORIES, 1941-1980

RETAIL SALES
1976-1980
(Billions)



	Music Industry Retail Sales	Personal Consumption	% of Personal Consumption	Gross National Product	Cost of Living Index
		(Billions)		(Billions)	1967 = 100
1980	$[illegible]	$1,572.6	0.130%***	$2,626.1	246.8
1979	[illegible]	1,428.5	0.156%	2,368.8	217.4
1978	[illegible]	1,340.1	0.172%	2,107.6	195.4
1977	[illegible]	1,200.2	0.166%	1,963.7	181.5
1976	[illegible]	1,079.7	0.176%	1,691.9	170.6
1975	[illegible]	963.8	0.160%	1,498.9	161.2
1974	[illegible]	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000*	804.0	0.189%	1,289.1	133.1
1972	1,308,179,000**	721.0	0.181%	1,161.8	125.3
1971	1,105,339,000	682.1	0.162%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	864,188,000	536.8	0.177%	865.7	104.2
1967	824,000,000	491.7	0.187%	785.9	100.0
1966	755,000,000	469.8	0.209%	739.6	97.2
1965	637,000,000	424.7	0.208%	676.3	94.5
1964	731,000,000	398.6	0.193%	628.7	92.9
1963	681,000,000	373.6	0.177%	589.2	91.7
1962	644,000,000	353.1	0.170%	560.3	90.6
1961	599,000,000	338.1	0.163%	520.1	89.6
1960	584,000,000	325.2	0.161%	503.8	88.7
1959	540,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	430,000,000	281.4	0.153%	441.1	84.3
1956	424,000,000	266.7	0.159%	419.2	81.4
1955	390,000,000	254.4	0.153%	398.0	80.2
1954	330,000,000	241.0	0.137%	364.8	80.5
1953	320,000,000	235.3	0.136%	365.4	80.1
1952	310,000,000	227.8	0.136%	347.2	79.5
1951	300,000,000	214.9	0.140%	333.3	77.8
1950	290,000,000	200.2	0.145%	294.8	72.1
1949	220,000,000	170.8	0.124%	258.6	71.4
1941	90,000,000	80.8	0.111%	124.9	44.1

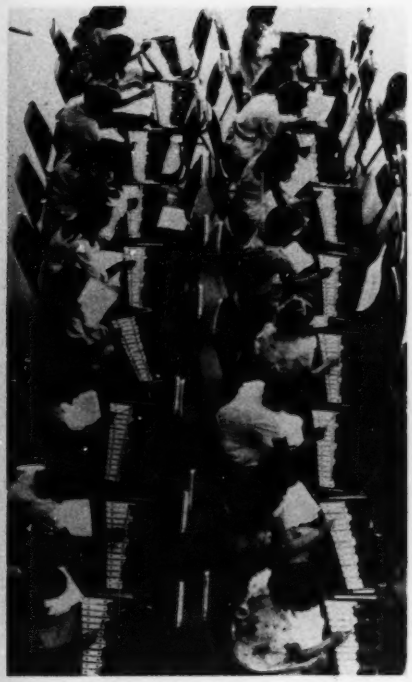
*For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music sales. Includes a new category—synthesizers.

**Includes a new category—electric pianos.

***To be read as a fraction of 1%.

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

MUSIC INDUSTRY SALES AT $2.1 BILLION IN 1980



Music industry sales are estimated to have been $2,180,800,000 in 1980, down approximately 7% from 1979.

The statistics reviewed in these pages reflect estimated retail sales of instruments, accessories, printed music, and sound reinforcement equipment sold through music stores based on manufacturers' shipments.

Although dollar increases in instrument price tags were well behind the cost of living increase of 14%, a sluggish economy, inflation and tight credit created price sensitivity among U.S. consumers, especially for big-ticket items.

Categories showing dollar increases in 1980 were electric pianos, synthesizers and printed music.

About these statistics

In all categories, "dollars" should be interpreted as sales at the retail level. Totals are based on the assumption that units manufactured during the year are also sold by retailers in that year.

The eight percent difference between sales reports of selected retailers (on page 13) and the final retail sales estimate, which is based on manufacturer shipments, can be attributed (at least in part) to tight retail inventory control in 1980.

In several categories, a percentage of the total dollars is estimated to reflect instrument rentals by students.

Only two categories in this review are based on an organized (but voluntary) reporting system and even within these categories (pianos and organs) estimates have been made for manufacturers who do not report their sales.

In the printed music and fretted instrument categories, figures are based on best estimates by the National Music Publishers Association and individual publishers, and the Guitar & Accessory Manufacturers Association as well as individual manufacturers.

In all other categories, retail sales are based on estimates calculated by combining an average retail value for American-made instruments (or accessories) with an average value of imports, where applicable.

In categories where there is no reporting system, a representative number of manufacturers is interviewed to arrive at a consensus on the size of the market.

This review omits a number of manufacturing areas for which it is extremely difficult to compile data: music kits, harp production, a variety of instruments used in elementary education, musical toys, estimates for craft production (other than bowed strings) or any used instruments.

Imports are figured into all relevant categories. Exports, which grew substantially in 1980, are included where indicated.

With the changing nature of imports (some foreign manufacturers are shipping parts from abroad and assembling in the United States, some are building manufacturing facilities here), and the tremendous increase in exports, determining the exact amount that is made and sold domestically is becoming more complex each year.

For all these reasons, it should be noted that while the figures are as accurate as a three-month study can make them each year, they are not definitive, and are intended only as a broad gauge aid in following market trends.

STATISTICAL INFORMATION

Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Units sold in 1980 were estimated to have been down 15%, while dollar volume was down 6%, reflecting a price increase of about 10%. After a strong first quarter in 1980, interest rates depressed the piano market until the last quarter, when it rebounded.

Sales of Pianos

	Units	Dollars*
1980	234,000	$ 433,080
1979	275,000	492,700
1978	282,172	411,371
1977	264,975	345,014
1976	242,000	303,605
1975	217,000	267,705
1974	246,400	278,943
1973	277,000	289,170
1972	268,000	260,604
1971	254,000	228,730
1970	262,000	224,500
1969	268,000	220,000
1968	258,000	198,660
1967	272,000	195,840
1966	282,000	193,170

*In thousands of dollars.
Source: National Piano Manufacturers Association and industry estimates.

Organs

Includes: Domestic production and imports with a retail value of over $400. Exports are not included in this table.

The high cost of consumer credit continued to dampen the organ market in 1980. Units were down 21% and dollars are estimated to be down 15%. Imports of organs fell 33%. Although organ sales in the low and mid ranges were sluggish, luxury priced units sold briskly.

Sales of Organs

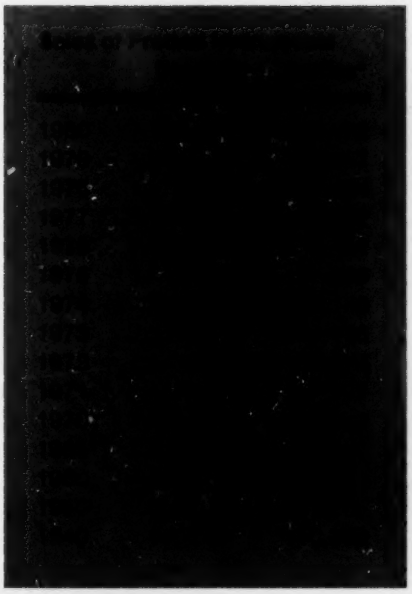
	Units	Dollars*
1980	138,724	$339,000
1979	175,159	396,457
1978	199,654	479,770
1977	222,400	510,168
1976	217,287	462,578
1975	205,772	397,[illegible]
1974	202,848	374,[illegible]
1973	209,278	348,[illegible]
1972	184,000	284,[illegible]
1971	145,000	211,[illegible]
1970	137,000	189,[illegible]
1969	150,000	198,[illegible]
1968	105,000	141,[illegible]
1967	8,000	14,[illegible]
1940	N/A	N/A

*In thousands of dollars.
Source: National Association of Electronic Organ Manufacturers, U.S. Tariff Commission and industry estimates.

Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

Tight consumer credit and a sharp drop in the number of imports is reflected in a unit and dollar decrease for fretted instruments in 1980. Total units shipped from Korea, which account for nearly 38% of imports in this category, were down about 61% in units. Dollars were off by more than half from the previous year due to an imposition of import duties and inflation in Korea.



**In thousands of dollars.*
Source: *Guitar and Accessory Manufacturers Association, U.S. Tariff Commission and industry estimates.*
***These years also include estimates of amplifier and P.A. system sales.*

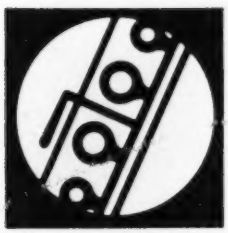
**Includes banjos, ukuleles and mandolins.*

Wind Instruments

Includes: Domestic production as well as imports. Exports are not included.

Sales of band instruments in 1980 continued to show the dampening effects of inflation: school and family budgets were tight and price resistance increased. Imports were up about 29%, with Japan and West Germany shipping more, lower-priced units.

Saxophones and flutes led sales in the woodwind category.



Woodwind Instruments

Brass Instruments

Sales of Band Instruments
A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars*
1980	831,000	$117,000
1979	329,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	345,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	359,000	85,073
1972	329,207	78,974
1971	308,000	68,902
1970	304,000	65,150
1969	302,000	61,000
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

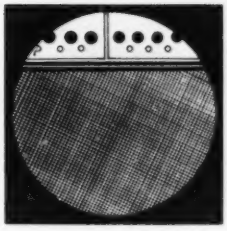
Sales of Band Instruments
B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

	Units	Dollars*
1980	197,000	$74,800
1979	220,000	80,300
1978	229,000	78,715
1977	234,060	72,602
1976	238,800	70,000
1975	259,000	68,823
1974	297,360	71,419
1973	284,000	68,764
1972	219,800	53,956
1971	210,000	51,544
1970	205,000	51,000
1969	130,000	34,000
1960	165,000	28,700
1950	85,000	13,000
1940	76,000	6,000

**In thousands of dollars.*
Source: Industry estimates.

String Instruments

Includes: Imports and domestic production of violins, violas, cellos and basses.



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

String units moved ahead modestly in 1980, while dollars fell behind because of lower-priced units imported from West Germany and the Republic of China. Imports from West Germany, which make up nearly half of the units in this category, dropped 17% both in units and total value and inexpensive units imported from the Republic of China doubled.

Unit sales of guitar amplifiers are estimated to have remained steady in 1980, while dollars dropped approximately 9% due to a change in consumer buying patterns. Smaller, less-expensive units and large, high-priced stack amps sold well, while the market for mid-priced amplifiers was weaker.

The sound system market remained steady; signal processing devices are reported to have sold particularly well as amateurs discovered their potential for creating a more professional sound.

Sales of String Instruments

	Units	Dollars*
1980	94,000	$38,000
1979	92,000	39,330
1978	83,500	38,500
1977	76,000	25,200
1976	83,000	26,400
1975	91,226	29,000
1974	83,656	19,466
1973	84,656	16,252
1972	91,258	12,589
1971	84,758	12,908
1970	85,000	19,720
1969	83,000	13,400
1968	40,000	7,300
1967	NA	NA
1966	NA	NA

*In thousands of dollars.
Source: U.S. Tariff Commission with adjustment made for domestic production.

Sales of Amplifiers**

	Units	Dollars*
1980	177,000	$82,000
1979	177,000	88,200
1978	177,000	89,000
1977	161,000	48,000
1976	158,000	48,972
1975	154,000	80,000
1974	140,000	65,000
1973	133,660	63,892
1972	110,000	43,245
1971	96,000	35,643

*In thousands of dollars.
**Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

Sales of P.A. Systems and Components** (mikes, mixers, power amplifiers, speaker systems and components, signal processors)

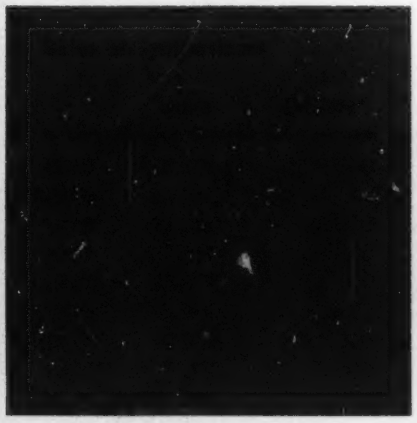
	Units	Dollars*
1980	NA	$121,000
1979	NA	125,000
1978	NA	110,000
1977	NA	100,000
1976	NA	100,000
1975	71,000	93,000
1974	60,000	45,000
1973	18,900	11,248
1972	16,000	10,516
1971	15,000	8,903

*In thousands of dollars.
**Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

Synthesizers

Includes: Production for domestic sale and export as well as imports.

Imports of synthesizers almost doubled in 1980, accounting for much of the sharp unit increase. About 30% of all units are imported and have an average retail value of under $700. Smaller, low-priced synthesizers were reported to be sales leaders. Another notable trend in this category was a strong movement to digital synthesizers.



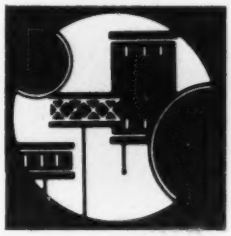
*In thousands of dollars.
**First year for inclusion of this category.
Source: Industry estimates.

Electric Pianos/ Electronic Keyboards

Includes: Domestic production, imports and exports. Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

Both units and dollars increased by approximately 3% in 1980, with imports accounting for about one-third of total units. Most electronic pianos and keyboards are used by either skilled amateur or professional performing groups. Their light weight and portability also suggests a larger potential educational role.

*In thousands of dollars.
**First year for inclusion of this category.
Source: Industry estimates.

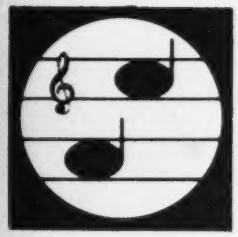


Drums

Includes: Domestic production of drums and percussion accessories and exports. Imports are not included.

Sales of drums are estimated to have dropped 2% in 1980, due to a sluggish economy and high interest rates which discouraged sales of sets. Percussion accessories sold well, however, as consumers upgraded their existing drum sets. The market for percussive instruments for marching bands continued to remain strong.

*In thousands of dollars.
Source: Industry estimates.
Unit figures unavailable since drums sold in sets

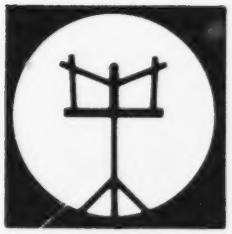


Printed Music

Includes: Domestic publishing of sheet music and self-instruction aids.

Retail printed music sales are estimated to have moved 2% ahead of the previous year. The market for gospel and sacred choral music was especially strong. Despite dropping enrollments, school closings and tight budgets, the school market remained stable. Self-instruction aids also remained steady, with self-help materials for guitar, piano and organ the most popular.

*In thousands of dollars. Source: Estimates from National Music Publishers Association. 1971-1973 NMPA figures were based on comprehensive survey data.
**Industry estimates.

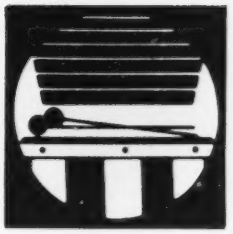


Accessories

Includes: Estimates for retail sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Accessory sales in 1980 are estimated to have remained stable; less expensive items were popular due to consumer price sensitivity. Strings, reeds, picks and electronic and percussion accessories all sold particularly well.

*In thousands of dollars. Source: Industry estimates.



Miscellaneous Other Instruments

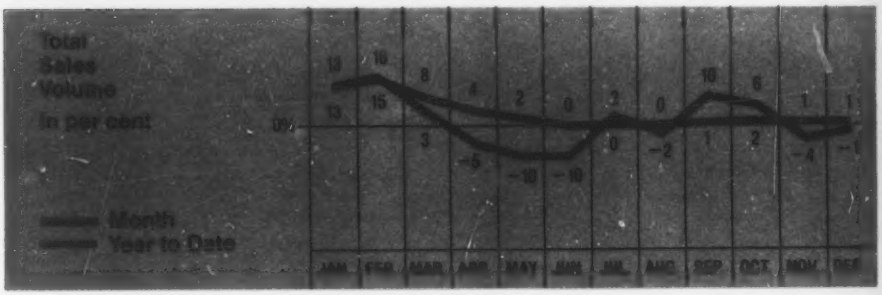
Includes: Imports of accordions, autoharps, bagpipes, bongos, chimes, concertinas, cymbals, drums, educational instruments, harmonicas, harps, harpsichords, marimbas, melodicas, organs valued under $400, recorders, xylophones.

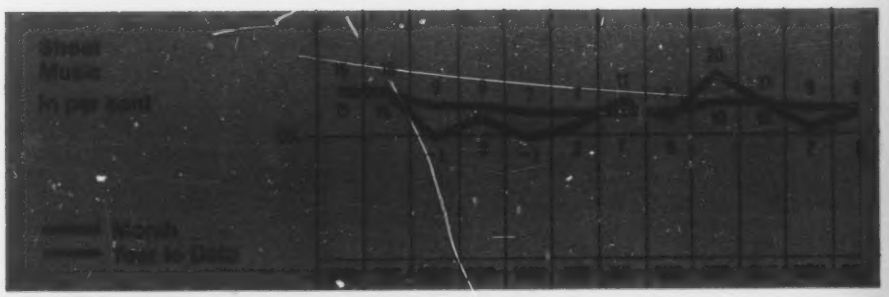
The total value for this category, which covers a broad range of imported instruments, was down 9% in 1980. Drums showed the largest decrease, down 46% from a total value of $8.7 million in 1979, to $4.6 million in 1980. Accordions and concertinas are now included in this category; their retail value is estimated at about $6.3 million in 1980.

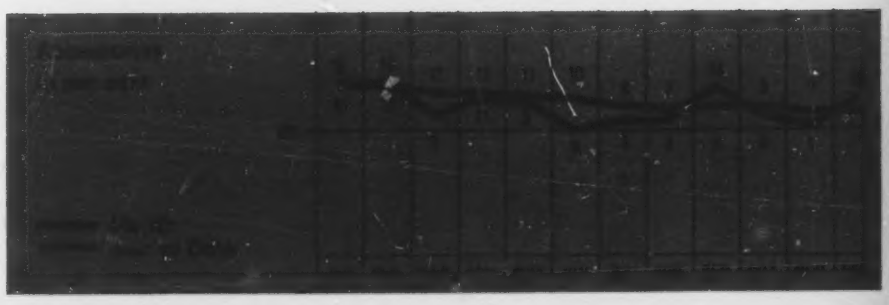
*In thousands of dollars.
Source: U.S. Tariff Commission.
**Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.

RETAIL SALES SHOW COMPOSITE THREE PERCENT GROWTH FOR THE YEAR

On each of the following graphs, the base line (0%) represents 1979 sales. Heavy lines within each graph indicate monthly changes and "year to date" status. Total sales volume for the industry includes sales of home entertainment equipment not shown by a separate chart.







This is the second year retail sales figures have been tabulated based on monthly reports made by selected retailers across the country.

An analysis of the charts prepared by Ernst & Whinney for the National Association of Music Merchants indicates that retail sales of band and orchestra instruments showed the largest gains, with sheet music and accessories following closely in those stores surveyed. Band and orchestra instruments were up 10% for the year; sheet music sales had a gain of 9%, and accessories were up 7% by the end of 1980.

Piano sales finished the year with a 3% increase and combo instruments were up 2%.

Sales of institutional organs, which were off considerably the first six months of 1980, registered major gains during July, August and September, then dropped again sharply to end the year with sales equal to 1979.

Except for the first quarter of 1980, sales of home organs were consistently below 1979 levels and ended the year off 9%.

Total sales volume declined steadily the first half of 1980, generally showed gains during the third quarter, then dropped again in October and November. A slight recovery in December brought total sales for the year up 1% over 1979.

AMATEUR MUSIC MAKERS INCREASE BY MORE THAN 50 PERCENT

In the past decade the number of Americans who say they can play a musical instrument has grown by more than half; from 31.5 million in 1970, to more than 50 million today.

A new Harris poll, conducted for the American Council for the Arts[1] indicates a dramatic increase over the past five years. Adults who say they now play a musical instrument "at least once in a while" rose by 66% between 1975 and 1980.

These millions of amateur musicians are of all ages and come from all walks of life: The pre-school child learning the fundamentals of playing a violin; the business executive taking first-time piano lessons; the loading dock foreman strumming guitar in his company-sponsored musical group, and the grandmother playing trombone in a marching band for senior citizens.

A survey for AMC undertaken by The Gallup Organization[2] found that 51% of all households responding included at least one amateur musician. In 48% of these households at least one instrument is owned, with guitar, piano and organ the most likely to have been purchased. In nearly half of the musical households, amateur musicians own two instruments and nearly a fourth own three or more.

More than one-third of all American amateur musicians are pianists, followed closely (30%) by guitarists.

[1]The 1980 Harris poll was sponsored by Philip Morris Incorporated and the National Endowment for the Arts.

[2]The 1978 Gallup survey was funded for AMC by a special grant from the National Association of Music Merchants.

Figures were tabulated from questionnaires returned by individual Instrumentalist Magazine subscribers who direct school band and orchestra programs at all educational levels throughout the U.S.

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Organ, clarinet, drums, flute, trumpet, violin, harmonica and saxophone complete the "top ten" list of most popular instruments.

Among players of these ten instruments, men are more likely to select guitar, drums, trumpet, harmonica and saxophone, while women make up the majority of those playing the piano, organ, clarinet, flute and violin.

According to the Gallup survey, active American amateur musicians tend to be young (under 35); come from families with incomes over $20,000, and have at least a high school education. Women make up approximately 57% of all amateur musicians.

Forty-three percent of amateurs live in suburban areas, and about half are college educated.

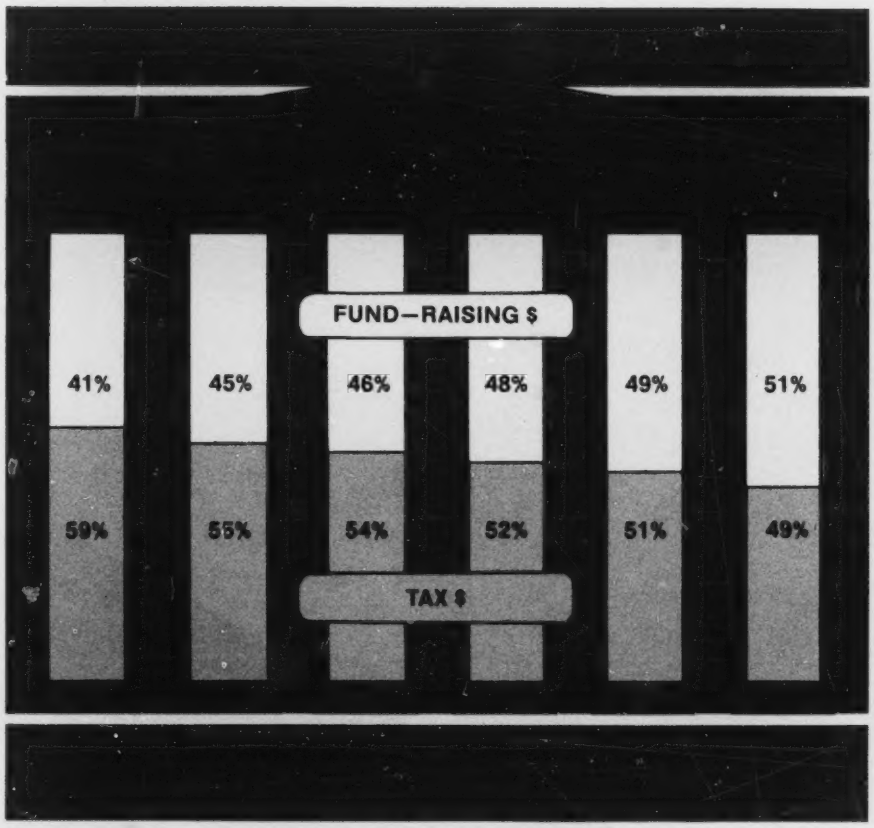
The school music scene

The Gallup survey on music participation also found that amateur musicians and nonplayers alike, generally agree that school music and other fine arts programs are important to a child's development.

Eighty-eight percent of those queried believed that music instruction should be part of a child's education; more than half felt music participation should be available to all children, and some 60 percent said music instruction should be part of the school curriculum.

An AMC survey of 25 state music supervisors in the spring of 1981 found that in addition to band and orchestra programs, guitar and piano group instruction is popular at both the elementary and high school levels.

Such instruction based on techniques developed by Orff, Kodaly and Suzuki is in use in many of these states' elementary schools. The supervisors also noted a prevalence of integrated arts programs which link music with the teaching of social sciences, drama, literature and even creative writing.



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Where budgets permit, electronic music labs are being utilized, and smaller ensembles that focus on ethnic or local folk music are being established.

Although total school enrollments dropped in 1980, the number of instrumental students remained about even, according to a survey taken among subscribers to the Instrumentalist Magazine.

About 15% of the student body in surveyed schools is estimated to be participating in instrumental music, an increase of 4% in four years. That means in an average high school an estimated 139 students play in a band or orchestra and 97 students in an average elementary or junior high school.

Music trends around America

During the past decade, as the number of American amateur musicians has increased, so has participation in a wide range of musical activities, many designed to meet specialized needs and interests.

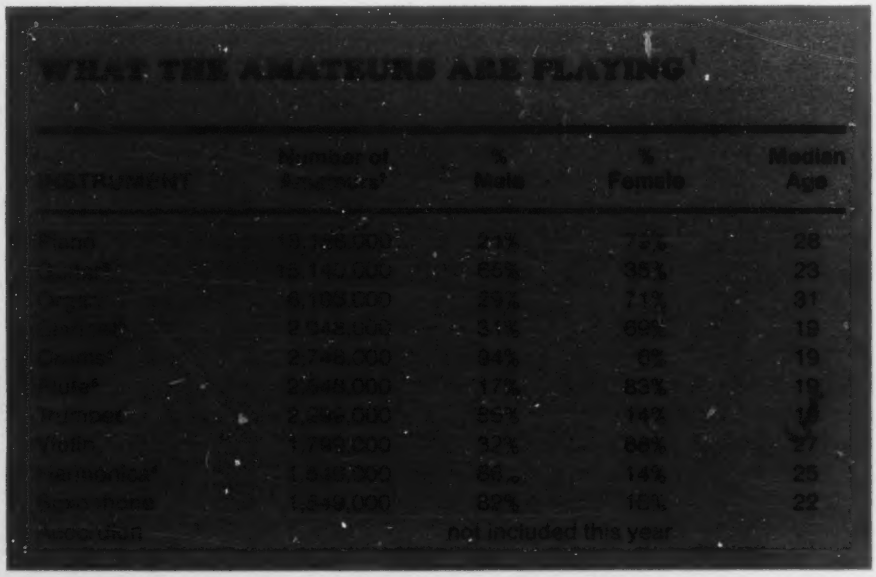
Teens: The appearance of specialized high schools for the performing arts is a recent development in one area of

school music. Nine such college preparatory schools have opened in the U.S. since 1979, offering classes in instrumental and vocal music, dance, drama, communications and visual arts. These schools make it possible for students to develop artistic talents while keeping up academically.

Senior Citizens: Increasing numbers of senior citizens are learning to play musical instruments for the first time. They are joining, organizing and conducting senior citizen bands and orchestras and joining music instruction classes designed especially for their age group.

Corporate Employees: In addition to standard benefit packages, some U.S. corporations offer employees the chance to use their musical skills. Hundreds of employees of corporations such as Goodyear Tire & Rubber Co., 3M, Metropolitan Life Insurance and Phillips Petroleum Co., participate in company-sponsored orchestras, bands, jazz ensembles, choruses and musical revues.

Women: Increasingly, American women are moving into the male-dominated music industry. Female entrepreneurs are taking over major music businesses, starting their own and studying the music business at the college level. Also, more women are now playing instruments formerly considered "male," such as trumpet or saxophone.



1. These figures represent national projections based on the results of a 1978 survey of 1,521 U.S. households by The Gallup Organization. The figures should be read as numbers of Americans (between the ages of 5 and 75) who say they play these instruments—and not an indication of instrument ownership.
2. Half of all amateur musicians play more than one instrument.
3. Includes acoustic and electric guitars.
4. This number reflects those who consider themselves experts on harmonica. Since several million harmonicas are sold annually, the number of players is probably much higher.
5. Median age for active players in these three categories is: clarinet—14; drums—16, and flute—18.

MUSICAL INSTRUMENT EXPORTS UP 8 PERCENT IN DOLLARS; IMPORTS DROP 11 PERCENT IN 1980

In 1980 the dollar value of exports of musical instruments surpassed the value of imports for the second consecutive year. Exports totaled more then $210.9 million (an 8 percent increase over 1979 shipments) while imports decreased 11 percent to $168.7 million, according to an American Music Conference analysis of U.S. Department of Commerce, Bureau of Census data.

These figures represent an almost complete reversal of dollar values reported only two years ago, when exports totaled $167.6 million and imports $199.2 million.

Although the 1980 dollar value was up—in some cases, sharply—for almost every category of exported instruments, corresponding units were down. The dollar increase also generally signaled higher costs per individual instruments shipped abroad.

One category of exports where both units and total value showed increases, was plucked and bowed stringed instruments (including harps, mandolins, clavichords, etc.), with units up 19 percent and a total value increase of 32 percent over 1979. American-made plucked and bowed stringed instruments were shipped to some 40 countries in 1980, with the largest quantities received by Japan and West Germany.

Although piano exports increased marginally in 1980, total value rose to more then $20 million; an increase of 13 percent over 1979. The average cost of a piano was up from $865 in 1979 to $995 in 1980.

Woodwind instruments shipped abroad were up slightly in units, but rose 42 percent in value. More expensive units were exported in 1980; the average value went up from $87 in 1979 to $221. While volume dropped by almost half, the value of brasswind instruments exported was 31 percent to a total of more than $12 million.

The number of electric guitar exports dropped 51 percent, but total dollar value rose 13 percent, with the typical exported guitar costing $212, as compared to $92 the previous year. The leading importer of electric guitars was the United Kingdom, purchasing 17,544 units at a total dollar value of approximately $3.7 million.

Also registering a decline in exports were acoustic guitars, which fell 31 percent in units but rose in total value to more than $12 million. The average export price tag for an acoustic guitar was $250, up 51 percent from the 1979 average of $166.

Exports of percussion instruments were ahead 9 percent to $13.6 million, and synthesizers and electric pianos were up 5 percent over 1979, bringing the total value to more than $21 million.

Electric organs are still the largest export category in dollars: More than 48,000 units were exported for a total dollar value of nearly $48 million. Dollar value for all electric organs exported was down 8 percent while units fell 12 percent below 1979. Australia, The Netherlands and Canada were the major purchasers in 1980.

Imports fall 11 percent

The 11 percent drop in dollar value of 1980 imported musical instruments is the steepest decline recorded in the last decade of statistical review by the American Music Conference.

The figures appear to indicate that in some categories lower cost imports were a spur to volume in 1980. Conversely, those instruments with a higher unit cost generally showed a decrease in volume.

Categories with the largest declines in both units and dollars during 1980, were acoustic and electric guitars and other stringed instruments.

Imported acoustic guitars plunged 46 percent in units and 28 percent in total dollars but the average price of an imported unit was up from $22 to $30. Electric guitar imports also showed a 46 percent decline in units, and were down 36 percent in total value; unit prices rose from $46 in 1979 to $55 in 1980. Other stringed instruments (including banjos and ukuleles) were down 32 percent in units and 11 percent in dollars.

Also showing decreases in both units and total dollars were imported pianos, (upright and grand): Units were down 3 percent and total dollar value dropped 10 percent. The average cost of an imported piano in 1980 was up 5 percent to $1,348 as compared to $1,284 in 1979. Japan was the leading importer of pianos, supplying 21,714 units, or approximately 86 percent of the total units. The landed value of a Japanese piano was $1,215 in 1980 as compared to $1,015 in 1979.

Declines in units were also registered for other electronic instruments (down 25 percent); saxophones (down 5 percent); synthesizers and electric pianos (down 4 percent), and other wind instruments (down 2 percent).

Imported electronic organs showed the largest increase in units: Up 235 percent in 1980. However, this increase reflected approximately 81,000 units (79 percent of the total units imported) with an average price of $15 coming from Hong Kong. The value of all instruments categorized as electronic organs dropped 37% to just over $5 million.

Imports of violins, violas and other bowed strings were up 2 percent in units but down 6 percent in total dollars.

Percussion instruments were down 12 percent in value for a total of slightly more than $11 million.

EXPORTS

MUSICAL INSTRUMENT IMPORTS

CATEGORY	1980 Units	1980 Value	1979 Units	1979 Value	1978 Units	1978 Value	1980 Leading Customers
Pianos	23,369	$ 31,486,137	27,139	$ 34,909,119	26,025	$ 31,388,878	Japan
Violins, Violas, Violoncellos, Double Basses	67,049	4,547,722	86,823	4,839,108	78,286	4,149,683	West Germany
Guitars, nonamplified	870,965	20,282,841	1,239,098	29,066,106	1,256,883	29,459,754	Japan/Korea/Taiwan
Other Stringed Musical Instr. (5)	156,361	4,024,583	201,838	4,515,309	196,036	4,065,928	Japan/Korea
Service for Musical Instr.	N/A	2,466,770	N/A	1,997,203	N/A	1,801,753	West Germany
Pipe Organs	67	1,790,668	88	4,046,858	64	2,683,975	Canada
Organs (except Pipe & Electric)	120,753	2,005,208	92,238	1,294,068	122,073	2,660,542	Canada
Accordions, Concertinas	10,436	1,567,125	10,215	1,734,768	17,379	2,131,882	Italy/West Germany
Mouth Organs (6)	267,228	1,589,883	115,798	5,689,394	213,510	3,782,621	West Germany
Percussion Musical Instr. (7)	23,975	3,503,975	18,524	3,165,114	26,109	4,001,512	Japan
Cymbals	17,514	2,608,660	14,514	2,568,549	23,936	2,616,643	France
Band Instruments	18,822	3,711,803	18,487	3,721,087	18,889	4,235,108	Japan
Other Wind Instruments (8)	966,666	4,660,769	865,452	5,247,323	886,657	5,269,705	Japan
Parts and Accessories, Musical Instr. (9)	N/A	11,748,804	N/A	12,811,474	N/A	13,682,786	Canada/Taiwan
Electronic Organs (9)	102,787	5,186,777	40,671	3,243,630	40,277	17,862,550	Japan
Amplifiers, Speaker Units	143,458	7,894,801	203,972	10,345,260	233,766	11,284,467	Japan/Korea
Accessories (9)	N/A	716,350	N/A	8,078,189	N/A	8,967,715	Japan
Pianos, Upright Types	N/A	36,698,611	N/A	49,268,028	N/A	41,860,284	Mexico
Electronic Musical Instr. (9)	68,459	5,791,261	19,206	8,981,387	N/A	7,820,404	Japan
Other Electronic Musical Instr.	N/A	1,420,988	N/A	1,696,149	N/A	1,286,186	Japan
TOTALS		$163,884,686		$190,318,106		$189,283,710	

(1) Source: U.S. Tariff Commission. (2) Includes bagpipes, kazoos, and other barred instruments. (3) Includes cymbals and drums. (4) Includes parts and accessories for organs and synthesizers, lyres, music stands, cases for musical instruments, metronomes, pitch pipes, tuning forks and tuning hammers. (5) Does not include banjos. Units are expressed in all cases in dozens. (6) Includes flutes and piccolos. (7) Over $10.00 in value. (8) Electric pianos and synthesizers. (9) The major rise in units and corresponding drop in value is due to approximately 65,000 units (with an average cost of only $15.00) imported from Hong Kong.

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AMC's goals are to:

- Create motivation to make music
- Help provide access to music instruction
- Stimulate opportunities for participation and sharing of musical skills

Association members include instrument manufacturers, publishers, wholesalers, retailers, suppliers, accessories manufacturers, trade magazines and music-related associations representing keyboard, band, percussion, fretted and electronic instruments.

The American Music Conference
1000 Skokie Boulevard
Wilmette, Illinois 60091
(312) 251-1600